FOREIGN CROPS and MARKETS

UNITED STATES DEPARTMENT OF AGRICULTURE
OFFICE OF FOREIGN AGRICULTURAL RELATIONS
WASHINGTON, D. C.

Vol. 43 December 1, 1941 No. 22

IN THIS ISSUE

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L A T E C A B L E S

Argentina fourth official estimate of 1941-42 acreages sown to specified crops reported as follows, with 1940-41 comparisons in parentheses: Wheat 18,038,000 acres (17,507,000), rye 2,661,000 (3,327,000), barley 1,972,000 (2,146,000), oats 3,519,000 (3,941,000), flaxseed 6,746,000 acres (7,103,000).

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Declared exports of Spanish pickled olives from the Seville consular district to the United States for the month of September 1941 were as follows: In brine, 22,032 gallons; pitted and stuffed, 67,056 gallons. These were composed of 42,240 gallons of Queens and 46,848 gallons of Manzanillas.

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British Ministry of Food announces that special cheese ration will be increased from 8 ounces to 12 ounces per week from December 15. Special ration is available to vegetarians, agricultural workers, miners, and laborers in many industries. Ministry also announces that priority in fresh egg supplies will be given to nursing and expectant mothers, certain classes of invalids, and children under 6 years. Instead of normal allowance of 1 egg, 4 will be available to priority consumers at each distribution.

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GRAINS

ORIENTAL WHEAT CROP UNCHANGED WITH IMPORT PROSPECTS CONFUSED . . .

With a slightly increased estimate of the 1941 Japanese harvest offset by a downward revision for that of Manchuria, the total Oriental crop remained unchanged on November 15 at about 803 million bushels, according to the American consulate general at Shanghai. All the increase from the 794 million bushels estimated to have been produced in 1940 occurred in China, where stocks this season are reported to be low and prices high. Import prospects for wheat appeared unfavorable at Shanghai, but arrangements were under way for bringing in some quantities of flour. All other trading continued to be restricted by Japanese controls.

China

Domestic wheat in the Shanghai region of China continued under Japanese control during the month ended November 15, with prices advancing from $0.88 and $0.90 per bushel to Japanese and Chinese buyers, respectively, on October 31 to $1.01 and $1.05 on November 10. Foreign wheat was quoted on November 3, c.i.f. Shanghai, as follows: Canadian No. 3, $1.52 and Western White No. 2, $1.73 per bushel. Wheat in the form of flour was considered more likely to be imported under the unsettled conditions prevailing, particularly in view of the high freight and insurance on wheat, but no flour arrived at Shanghai in October and none was expected until late December. United States flour was quoted at about $1.78 per bag on November 5 and Canadian from $1.55 to $1.57. Local wholesale prices showed a sharp advance around the middle of October but dropped to about $2.38 per bag on November 10, when control plans were announced by the Municipal Council. Visible flour stocks were estimated at from 600,000 to 900,000 bags on November 15, indicating a supply adequate for consumption needs during 2 or 3 months only. Reexports to North China and extensive hoarding were thought to have considerably reduced available stocks.

Imports of wheat into China during September amounted to 292,000 bushels and those of flour to 359,000 barrels, as compared with 495,000 bushels and 157,000 barrels, respectively, in September 1940. Future flour takings were reported to be dependent upon the control plans of the International and French Municipal Council. Some improvement in prospects was expected to result from arrangements under way for public sales. An importers' association, recently organized, is said to have promised full cooperation with the Council and will not release foreign flour to retailers unless they are willing to sell in conformity with control plans and at fair prices to legitimate individual buyers. It is planned that imports involving about $100,000 each week may be made on order from the Council, with an exchange allotment promised by the Currency Stabilization Board and importers pledging to bring in and distribute such

quantities as designated by the Council. The first shipment of 64,000 bags of Canadian flour, purchased by the Council at about $1.56 per bag, is expected in late December.

CHINA: Imports of wheat and flour, by country of origin, September 1941, with comparisons

Commodity and country	September			July-September		
	1939	1940	1941	1939	1940	1941
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
Wheat						
United States	133	395	77	2,292	758	579
Canada	-	-	163	-	-	306
Australia	-	-	-	2,448	-	290
Japan	-	-	52	-	-	52
Others	-	100	-	-	100	70
Total	133	495	292	4,740	858	1,297
	1,000 barrels	1,000 barrels	1,000 barrels	1,000 barrels	1,000 barrels	1,000 barrels
Flour						
United States	149	87	189	498	135	481
Canada	5	3	14	33	8	112
Australia	95	15	19	432	144	68
Japan	29	52	137	47	459	242
Others	2	-	-	9	7	1
Total	280	157	359	1,019	753	904

Official sources and American consulate, Shanghai.

Manchuria

Estimates of the 1941 wheat crop of Manchuria have recently been revised downward, with trade figures indicating a reduction of 5 to 25 percent from the 1940 harvest. The American consulate at Shanghai places the outturn at about 29 million bushels as compared with about 28 million bushels produced in 1940. About 3.4 million bushels are reported to have been collected by the Government, but the labor shortage, poor transportation, and inadequate storage facilities have greatly hampered Government purchases. The quality of the new crop is said to be good except for a high moisture content.

Although crops are generally supposed to have been smaller this season, the Government plans to increase grain shipments to Japan, Chosen, and North China over those of last year. The authorities admit, however, that crop collections have not been up to schedule, particularly those of millet, kaoliang, and corn.

Japan

The final official estimate of the 1941 wheat crop of Japan was placed at 53,800,000 bushels as against the record crop reported for 1940

of 66,134,000 bushels. Government collections were reported by the press to have shown some improvement during October, in spite of unfavorable weather and inadequate transportation facilities, which also caused confusion in the control policy and misunderstanding by the farmers. Only 40 percent of the September flour allotment for Tokyo of 420,000 bags was made by October 1, and the distribution continued to be slow until completed about October 21. With arrivals falling behind schedule, it was reported that the quotas could not be long maintained, and downward revisions appeared likely.

No foreign flour was imported during September and October, and prices of both flour and wheat were unchanged. The reduced harvest and strong domestic demand were expected to curtail flour shipments to Manchuria, while the reduction in Manchurian crops made it probable that the exportation of miscellaneous grains from that country to Chosen would be decreased and shipments of Chosen rice to Japan correspondingly reduced.

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ARGENTINA AGAIN FIXES
MINIMUM WHEAT PRICES . . .

The Argentine Government has again authorized the Grain Board to purchase domestic wheat at fixed minimum prices, according to an announcement of November 15 cabled to the Office of Foreign Agricultural Relations. The basic price for 1941-42 wheat of exportable quality, delivered at Buenos Aires, was continued at 6.75 pesos per quintal (about 54.7 cents per bushel at the official exchange rate), the same as paid for the 1940-41 crop, but the control of the Board over the wheat trade was extended to include all export as well as domestic sales. At the same time, futures transactions in wheat, flaxseed, and sunflower seed were prohibited in all Argentine grain markets in order, it was stated, to avoid undue disturbances in grain trading.

Purchases of wheat are to begin on December 1 and are made contingent upon the promise by producers not to increase their wheat acreage in the coming season and to reduce it by not more than 10 percent if requested to do so by the Board. Furthermore, in cases of dispute, the Ministry of Agriculture has been given the authority to secure, as a condition for purchases made at the minimum prices, acceptance of decisions made by an arbitration commission for the adjustment of land rentals. As in 1941, sales to millers must be made by the Grain Board at a fixed price of 9.00 pesos per quintal (about 72.9 cents per bushel). This feature was included for the first time in the legislation of last year, and was intended by the Government to pass on to the milling industry part of the expense involved in maintaining the price guaranty to farmers.

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The minimum price guaranty has been employed by the Argentine Government as an aid to producers of certain crops off and on ever since November 1933. At that time, the Grain Board was established and given authority to purchase at the prices fixed all the wheat offered by the farmers and to handle all other Government transactions in that grain, such as storing and selling for export, but the farmers were left free to sell in the open market if they so desired. The decree of November 1940, however, placed sales to millers under the control of the Board, and the present legislation states that wheat for export must be obtained from the Board alone, with the result that the Board now has power to control both export and domestic sales.

The first official estimate of the 1941-42 wheat crop will not be released until about the middle of December. Seedings were increased this year to 18,038,000 acres, as compared with 17,507,000 for the 1940-41 season, but the crop has suffered from frost damage and lack of adequate moisture. Prospects, therefore, point to a crop of about 200 million bushels, or even less, but with a heavy carry-over of old-crop wheat, the total supply for the new marketing season of 1942 appears likely to be about as large as that of 1941.

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SWEDEN DECREES THE MIXING OF BARLEY FLOUR WITH WHEAT AND RYE FLOUR . . .

As a result of the poor bread-grain crop harvested in Sweden this year, the Government Food Commission has required since October 16 that all flour from wheat or rye, intended for human consumption, be mixed with barley to the extent of 6 percent at least. The previous mixing regulations of September 1, prescribing that all wheat flour must contain at least 15 percent of rye flour, were changed to require only 10 percent rye, and monthly millings of spring wheat were reduced from 40 to 30 percent of the total wheat milled. Although it was previously reported that potato flakes would be used to supplement the reduced bread-grain supply, no regulations in this regard have been announced.

The 1941 wheat crop of Sweden was officially estimated at only 12.5 million bushels as compared with 15.5 million in 1940 and the 1935-1939 average of 26.4 million bushels. Rye production was placed at 11.1 million bushels as against 10.5 and 14.8 million bushels, reported for 1940 and the 5-year average of 1935-1939, respectively. Annual domestic requirements of wheat and rye in Sweden normally average (1933-1937) about 24 million and 16 million bushels, respectively. Some stocks of these grains were carried over into the current marketing season, but it is not known to what extent they will offset the shortage in bread-grain production.

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VEGETABLE OILS AND OILSEEDS

MANCHURIAN SOYBEAN HARVEST MAY BE SMALLER THAN 1940 . . .

Scant information indicates that the 1941 Manchurian soybean crop may be slightly less than last year. Unofficial estimates place the acreage about 10 percent below last season, but growing conditions during the summer were favorable and it is thought the yield per acre may be higher than in 1940.

The short crop is believed to be primarily the result of the Government policy of marketing agricultural commodities. Early in the spring, it was announced that the official price for 1941 would be 13.40 yuan per 100 kilograms (about 86 cents a bushel) without gunny bags, for beans delivered at Harbin. Under this system, farmers were required to conclude in July or August contracts with Government agents. They would then receive in advance a bounty of 1 yuan per 100 kilograms (6.4 cents a bushel), but the bounty would not be paid for uncontracted produce.

MANCHURIA: Soybean acreage, production, and yield, 1935 to 1941

Year	Acreage: Planted	Acreage: Harvested	Production	Yield per acre
	1,000 acres	1,000 acres	1,000 bushels	Bushels
1935	8,162	7,840	141,793	18.1
1936	8,570	8,335	153,330	18.4
1937	9,012	8,787	159,907	18.2
1938	9,560	9,392	157,445	16.8
1939	10,287	a/	b/ 144,952	c/ 14.1
1940	7,764	a/	d/ 117,579	c/ 15.1
1941	d/ 6,987	a/		

Estimates of the South Manchurian Railway, 1935-1938; Manchoukuo Ministry of Industry, 1939 and 1940.
a/ Not available.
b/ Trade information places this crop at 125 million bushels.
c/ Yield per acre planted.
d/ Unofficial estimate.

At the end of June, a total sum of 3,266,000 Manchurian yuan ($765,000) had been advanced under the contract-bounty system. This would involve contracts totaling around 12 million bushels of soybeans, which is only a fraction of the total crop. A later announcement stated that contracts for 95 million bushels had been concluded by the

Government. The trade estimates that commercial production will be below this amount and that there will be unfilled contracts of from 10 to 12 million bushels. This represents a considerable sum in Manchurian currency that must be refunded by farmers to the Government. The latter has announced, however, that it will not accept refunds and that the quantities contracted for must be delivered.

Exports from the 1940-41 crop have not been released, but unofficial reports state that not more than half of the beans or oil supposed to be shipped to Germany, via the Trans-Siberian Railway, had been shipped before the outbreak of Russo-German hostilities. Reliable sources report that 1.3 million short tons of bean cake and 33 to 37 million bushels of beans were to be taken by Japan.

Local consumption of soybeans during the 1941-42 season is expected to exceed 37 million bushels, owing to the greatly enlarged use of soybeans by farmers and the urban population as a substitute for wheat flour, which is almost unobtainable.

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EXPORTS OF SOYBEANS AND OIL
FROM UNITED STATES . . .

UNITED STATES: Exports of soybeans and soybean oil, by months, 1939-40 and 1940-41

Month	1939-40		1940-41	
	Soybeans	Soybean oil	Soybeans	Soybean oil
	Bushels	1,000 pounds	Bushels	1,000 pounds
October	2,525,548	1,441	30,071	1,897
November	3,849,194	2,461	50,437	1,021
December	2,214,585	2,327	755	1,107
January	1,609,672	923	852	1,229
February	710,208	1,661	6	1,432
March	37,849	2,929	0	1,878
April	318	845	339	1,078
May	174	1,432	1,402	2,706
June	1,013	1,286	155	805
July	106	1,074	21,545	425
August	18	478	100,375	437
September	468	1,300	31,557	408
Total	10,949,153	18,157	237,494	14,423

Compiled from official records, Bureau of Foreign and Domestic Commerce.

C O T T O N - O T H E R F I B E R S

JAPAN'S COTTON IMPORTS DECLINE SHARPLY . . .

Purchases of American cotton for importation into Japan have ceased since the institution of the freezing regulations in July, and imports from India have been negligible, according to information received in the Office of Foreign Agricultural Relations. In August an agreement was reported between the Indian and Japanese Governments for shipment of approximately 80,000 bales of Indian cotton, practically all of which was contracted for prior to imposition of freezing orders. It is stated now, however, that up to November 1 not more than 25,000 bales of that amount have arrived in Japan since July, and it is believed that no further shipments will be received from India for an indefinite period. It is estimated that only about 25,000 bales of Brazilian and 30,000 bales of Peruvian cotton have arrived since July, making an estimated total of 75,000 to 80,000 bales for the 3 months ended October 31 compared with a monthly average of more than 100,000 bales in the early months of the year. Export statistics for Brazil and Peru show 17,000 and 48,000 bales, respectively, exported to Japan between August 1 and October 30, 1941.

Cotton is still arriving from South America but in much smaller quantities. Brazilian statistics show no exports to Japan since August. Shipments from Peru to Japan amounted to only 6,000 bales in October and 6,000 in the first 3 weeks of November. No available estimates of Japanese imports of cotton from China are available, but Japanese press reports are optimistic concerning the cotton crop in North China and Japan's prospects of obtaining a larger portion of it this year. Reports from Shanghai indicate that total shipments to Japan in 1941-42 may reach about 350,000 bales compared with 300,000 bales last year. No information is available regarding shipments of piecegoods to countries outside the yen bloc since the imposition of freezing regulations. There are some unconfirmed rumors, however, that a portion of Japan's large stocks of cotton piecegoods have been shipped to Shanghai for reshipment outside the yen bloc.

Consumption of cotton in Japan for domestic purposes in 1940-41 has been estimated at 50,000 bales monthly, but some estimates are as high as 100,000 bales monthly because of heavy production of cotton goods for military purposes. The Japanese press carries numerous articles regarding plans for increasing civilian consumption of cotton goods, and release of pure cotton goods for this purpose, inasmuch as it is impossible to export these goods at the present time. Japan's stock of cotton piecegoods, estimated at more than one billion square yards, could be diverted to domestic use if the cotton supply situation became critical, but no changes have yet been made in the mixing regulations and the distribution of cotton for domestic use that have existed during the past year.

Raw cotton stocks at the end of August were estimated at about 450,000 bales and had increased to approximately 500,000 by the end of October. This quantity is sufficient for about 6 months if only the most urgent requirements for civilian and military purposes are considered. The large stocks of cotton goods in Japan and the availability of considerable quantities of raw cotton from North China reduce the possibility of a shortage of cotton materials in Japan in the near future, but under present conditions, the future of the cotton industry is very obscure.

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SHANGHAI COTTON PRICES SOAR AS IMPORTS DECLINE . . .

Cotton prices at Shanghai have advanced steadily during the past 14 to 16 months and reached a record level on November 8, 1941, mainly as a result of import difficulties and the tense political situation in the Far East. Spot quotations for Brazilian cotton (similar to American Middling 15/16 inch) were equivalent to about 54.46 cents per pound on that date or nearly three times the prices of the previous month for forward shipments. The higher prices were attributed largely to heavy buying in the local market by Japanese buyers at prices much higher than were offered by others, together with sharp rises in prices of other commodities. The rise in the general price level was due partly to high exchange rates in terms of Chinese currency on the free market. Spot quotations in some cases rose to more than double those for December shipments as shown in the table below.

COTTON: Prices per pound at Shanghai on November 14, 1941 a/

Growth	December shipment	Spot price
	Cents	Cents
American Middling 7/8 inch	20.93	33.67
Indian Akola	12.00	29.71
Brazilian b/	19.09	c/ 45.55
Brazilian b/	-	d/ 49.51

American agricultural attaché, Shanghai.
a/ Converted at legal rate of 1 yuan = 5.28125 cents.
b/ Equivalent to American Middling 15/16 inch.
c/ For sale only to British and Chinese mills.
d/ Free cotton for sale to Japanese buyers.

Cotton prices remained around the level of November 8 for a few days, but since that time have been forced gradually downward as steps have been taken by the local authorities to prevent profiteering. Speculative purchasing of cotton and cotton yarns as a means of protection against the depreciation of Chinese currency has been heavy.

Imports of cotton into China amounted to only 33,000 bales in October as a reflection of continued difficulties of securing foreign exchange and shipping facilities for further imports. Current arrivals, unsold stocks at Shanghai, and forward purchases are still made up predominantly of Brazilian cotton.

CHINA a/: Imports of cotton, by country of origin, September 1941, with comparisons
(In bales of 478 pounds net)

Country of origin	September			October-September		
	1939	1940	1941	1938-39	1939-40	1940-41
	Bales	Bales	Bales	Bales	Bales	Bales
United States	3,695	4,884	5,749	99,148	441,077	135,246
British India	45,223	41,202	7,558	663,784	466,491	469,359
Egypt	1,603	92	453	33,764	36,774	10,229
Brazil	64,067	33,972	16,120	207,940	149,067	221,009
Others	2,384	2,429	3,031	15,916	31,652	17,202
Total	116,972	82,579	32,911	1,020,552	1,125,061	b/853,045

Compiled from Monthly Returns of the Foreign Trade of China.
a/ Excludes Manchuria.
b/ Includes an estimated 50,000 bales reexported.

Unsold stocks of cotton at Shanghai at the end of October were estimated at 67,000 bales, 40,000 of which were Brazilian, 12,000 Chinese, and 5,000 each of American and Indian. Forward purchases were much lower than normal and estimated at 34,000 bales, including 20,000 Brazilian, 10,000 Indian, and 2,000 American. Arrivals of native cotton amounted to about 13,000 bales in October, only about 30 percent of which reached mills not under Japanese control. This exceptionally low figure is attributed to more strict Japanese control of the native cotton crop and communications with Shanghai.

All cotton mills in China, including Manchuria, operated in October at about the same rate as in September with total cotton consumption estimated at about 114,000 bales. Japanese mills at Shanghai are still operating at only 45 to 50 percent of capacity, but are reported to be planning for an increase in the near future.

Cotton crop conditions in China have been relatively favorable this year and there is no change from the last estimate of 2,400,000 bales made by the American agricultural attaché at Shanghai. The 1941 cotton acreage in Manchuria is believed to have been about the same as in 1939 (273,000 acres) and 30 percent above the small harvested area of 210,000 acres in 1940. The 1941 cotton acreage for all China was estimated at 6,135,000 acres against 6,108,000 in 1940.

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TOBACCO

SMALL TOBACCO CROP IN TURKEY; STORAGE SPACE LIMITED . . .

Latest estimates from the growing areas indicate that the 1941 tobacco crop in Turkey will amount to approximately 121 million pounds, or 20 percent less than the 1940 production, according to information available in the Office of Foreign Agricultural Relations. The quality of the new crop is reported to be good, but not quite equal to the unusually fine crop in 1940. Prices will probably be high. It is expected that Germany will be a heavy buyer, as it is believed that the total Greek and Bulgarian crops will not be sufficient to fill the German requirements.

One factor that will play a most important part in sales of the new crop is transportation. At the present time, a large part of Germany's purchases from the 1940 crop are still warehoused in Turkey, awaiting the reopening of transport routes either through the Black Sea or through the Aegean and the Mediterranean to Trieste. Considerable stocks purchased by local buyers for resale to other countries also await transportation facilities. British tobacco interests will expend the usual amount (interest and amortization on the British credits to Turkey) for the new crop; but the purchasing program of American companies will presumably be dependent upon transportation and the turn of political developments in Turkey.

The storage problem, already acute since the outbreak of the war, has undergone but little improvement in the past year, and it is feared that the situation will become worse this fall if the existing stocks of tobacco are not moved in order to make room for the current crop.

TURKEY: Estimated production of tobacco in principal producing districts, 1939-1941

District	1939	1940	1941
	1,000 pounds	1,000 pounds	1,000 pounds
Aegean	77,161	73,744	57,119
Black Sea	19,841	34,469	30,077
Marmora	5,512	33,219	27,796
East Anatolia and others	18,739	7,868	5,511
Total	121,253	149,300	120,503

Compiled from trade sources.

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FRUITS, VEGETABLES, AND NUTS

MEXICAN FRUIT PRODUCTION EXPANDING . . .

The official final crop estimates recently released by the Mexican Government for the 1940 production of certain fruit crops in Mexico reflects the upward trend in fruit production. The 1940 crops of apples (both table and cooking), pears, oranges, and limes were the heaviest on record, while the peach crop was the second largest on record. During the past decade, the sharpest expansion in production was in oranges, which rose from an average crop of 3,499,000 boxes in the 1931-1935 period to 6,549,000 boxes in 1940, or an increase of 87 percent. The output of limes expanded 65 percent on a comparable basis, cooking apples 53 percent, table apples 42, and pears and peaches 34 percent.

MEXICO: Production of specified fruits, average 1931-1935, annual 1936-1940

Fruit	Average 1931-1935	1936	1937	1938	1939	1940
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
Table apples	674	712	611	683	869	958
Cooking apples	580	486	493	510	664	890
Pears	335	278	317	352	442	449
Peaches	1,194	1,272	1,191	1,540	1,815	1,598
	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes
Oranges	3,499	4,582	4,633	5,266	5,772	6,549
Limes	574	627	580	699	898	945

Compiled from official sources. Converted as follows: Apples and peaches to bushels of 48 pounds, pears to bushels of 50 pounds, oranges to boxes of 70 pounds, limes to boxes of 76 pounds.

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HONDURAS GRAPEFRUIT CROP HEAVIER . . .

The 1941-42 grapefruit crop in Honduras is preliminarily estimated at 140,000 boxes compared with the revised 1940-41 estimate of 80,000 boxes, and the average estimate of 86,000 boxes for the 5 years, 1936-37 to 1940-41, according to reports received by the Office of Foreign Agricultural Relations. The heavier current production is due to the absence of locusts, which seriously damaged the crop last season. Since the locusts are not expected to return for 3 years, another large crop is being anticipated for the 1942 production.

Exports for the current season are expected to be around 60,000 boxes compared with the movement of 29,066 boxes in 1940 and an average export of 47,836 boxes in the 5 years, 1937-1941. Thus far in the 1941-42 season, 39,412 boxes have been exported. Honduran exports go largely to Canada, with a small proportion moving to Panama. Honduran fruit competes in Canada with British Honduran fruit, which benefits from Imperial preference, and later with grapefruit from Florida. Honduran fruit usually moves about 2 months earlier than Florida fruit. Canadian demand during the current season has been active, and Canada is reported to be in position to take all of the grapefruit that can be shipped from the country.

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CANADA PERMITS IMPORTS OF MANDARINS AND TANGERINES . . .

Mandarins and tangerines may now be imported into Canada without quantitative restriction under the terms of an Order in Council dated October 28, 1941. This Order in Council amends the War Exchange Conservation Act regulation of December 2, 1940, which prohibited imports of these commodities from the United States and other nonsterling countries. The recent Order in Council gives mandarins and tangerines tariff treatment identical with that afforded oranges, which were not prohibited under the War Exchange Conservation Act. As a result of this Order, United States mandarins and tangerines are subject to the import duty of 35 cents per cubic foot between August and December and are free of duty the rest of the year. Whether free or duitable, imports are subject to the special 10-percent "War Exchange Tax."

This Order has considerable interest for the citrus industry in Florida and other Gulf States. Tangerines from Florida and satsumas (mandarin variety) from the Gulf States were exported to Canada on an increasing scale prior to the prohibition of last December. This market has been especially important to the Florida industry, for the trade there has made active efforts in recent years to expand their outlets in the United States and Canada in order to dispose of their increasing production. Japan has been the principal source of supply of Canada's imports of mandarins and tangerines and, consequently, the principal competitor to United States tangerines and satsumas in Canada.

Another provision of the Order was to cancel the earlier Order of November 30, 1931, which provided for the entry free of duty of mandarins and tangerines grown in Japan and imported into Canada direct from that country. As imports from Japan into Canada have been prohibited since the customs memorandum of September 25, 1941, this Order merely removes any possible doubt as to the tariff status of mandarins from that country.

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SPANISH PAPRIKA CROP
ESTIMATE REDUCED . . .

The second estimate of the 1941 Spanish paprika crop placed production at between 12 and 13 million pounds, or slightly below the earlier estimate, according to information received by the Office of Foreign Agricultural Relations. The acreage planted this year was larger than that in 1940, but the yield per acre was lower due largely to the shortage of fertilizers. Heavy rains in September delayed the harvest and caused some damage to that part of the crop which ripened early. Trade sources indicate that the carry-over from 1940 is small and is of inferior quality so that it cannot be used in the export trade. Current exports have been moving largely to the United States, Argentina, Uruguay, Cuba, and certain Central American countries, with minor quantities moving to Germany and France. Exports to the United States for the period January-September 1941 totalled 1,698,000 pounds.

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SPANISH FILBERT CROP REDUCED FURTHER
BY BAD WEATHER . . .

The preliminary estimate of the Spanish filbert crop for 1941 has been reduced to 17,000 short tons, unshelled basis, because unfavorable weather conditions in August and September lowered the expected outturn. This estimate is comparable with the production of 22,000 tons for 1940, the recent 5-year average crop of 26,800 tons for the 1935-1939 period, and the 10-year average of 25,600 tons for the period 1930-1939.

SPAIN: Estimated production of filberts, 1930-1941

Year	Production	Year	Production
	Short tons		Short tons
1930	10,500	1936	26,000
1931	24,000	1937	32,000
1932	35,000	1938	28,000
1933	14,000	1939	24,200
1934	38,000	1940 a/..........	22,000
1935	24,000	1941 a/..........	17,000

Estimates of the Office of Foreign Agricultural Relations.
a/ Preliminary estimates revised.

The Government agency previously controlling the marketing of the filbert and almond crops has now been liquidated. The "Rama de la

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Almendra-Avellana" closed its warehouse and ceased operations on May 8. Recently, a report on its operation for the 1940-41 season was released. The quantity of shelled filberts handled by the Rama was: Domestic sales 3,183 short tons; export sales 2,234 tons; shrinkage 12 tons; total 5,429 tons. It is apparent that the Rama did not handle the entire 1940-41 filbert crop, so that these figures represent neither total production nor total sales. In fact, it is estimated that between three-eighths and one-half of the crop did not pass through the Rama.

According to trade estimates, only about 25 percent of the 1940 crop was exported. This is partly due to factors arising out of the war, but the scarcity of other foodstuffs undoubtedly contributed to the large expansion in domestic consumption of filberts. The nut has not only been used for fresh consumption but also in the extraction of oil and in the production of a type of edible flour or meal. It is thought that exports during the coming season will be even further reduced, unless substantial export sales are contracted through diplomatic or other channels.

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CHINESE WALNUT CROP REPORTED HEAVIER;
EXPORT OUTLOOK UNFAVORABLE . . .

Trade estimates place the 1941 walnut production in China at about 15 to 20 percent above the estimate for the 1940 season, according to information received by the Office of Foreign Agricultural Relations. The crop harvested in the Peiping area is reported to be poor in quality, but average quality is reported for nuts in other North China producing areas. The volume of walnut meats available for export during the 1941-42 season is placed between 180,000 and 200,000 export cases (of 55 pounds) compared with from 150,000 to 175,000 cases for 1940-41 and only 100,000 to 150,000 cases in the 1939-40 season, when the crop was short and transportation difficulties interfered with marketing.

The Tientsin walnut market opened on September 1 for the 1941-42 season. Reported sales for the first half of the month have been placed at 574 bags of unshelled walnuts and 48 native cases of kernels sold to Shanghai and Cantonese dealers. No sales to exporters were reported. Early season prices exwarehouse Tientsin were quoted in Federal Reserve Bank dollars (Japanese controlled bank) at about 30 percent below those ruling a year ago, but the equivalent in United States dollars is much more, for the Federal Reserve Bank dollar has risen in terms of United States currency from 5.5 to 9.9 cents.

No exports of walnut kernels or unshelled walnuts from Tientsin to the United States took place in the first half of September nor were any shipments at that time expected for the near future. Tientsin exporters had not entered the market this year. No specific data are available on

exports to other countries since no statistics or other data are published. This movement, however, has been reported as exceedingly small and has been largely to domestic (Chinese) ports, especially Shanghai.

The carry-over from the 1940 crop of unshelled walnuts was negligible and stocks of walnut kernels were estimated at about 75,000 pounds. New-crop nuts had been arriving in Tientsin from interior markets (largely Peiping and Tsinan areas) but the volume has been below normal, since the cost of the nuts at these interior points, plus transportation charges were higher than the Tientsin open market selling prices.

The outlook for Tientsin walnut markets for the 1941-42 season is not encouraging, for the credit-freezing orders of the American Government and counter measures taken by the authorities in control of North China make direct business with the United States, the major export market, impractical at present. Unless this situation improves, walnut exports will be severely curtailed despite adequate supplies. The outlook is not hopeless, however, so long as cargo can move to Shanghai and trade between Shanghai and the United States does not become too seriously restricted.

China has been the most important supplier of shelled walnuts to the United States for a number of years. Since the middle of the last decade, Chinese walnuts have accounted for the major portion of United States imports, due to the rapid decline in American imports from European countries, which formerly were the leading walnut suppliers to this country. Total United States imports in the 1940-41 season, October-September, amounted to 84,361 cases of 55 pounds, or slightly above imports in the 3 preceding years.

UNITED STATES: Imports of shelled walnuts, October-September, averages 1929-30 to 1938-39, annual 1936-37 to 1940-41

Country	Average 1929-30 to 1938-39	Average 1929-30 to 1933-34	1936-37	1937-38	1938-39	1939-40	1940-41
	1,000 cases	1,000 cases	1,000 cases	1,000 cases	1,000 cases	1,000 cases	1,000 cases
China ...	67	80	68	48	61	61	79
France ..	51	89	12	13	6	11	2
Turkey ..	8	9	3	1	2	2	1
Rumania .	5	5	7	6	6	4	a/
Others ..	11	18	8	5	5	1	2
Total .	142	201	98	73	80	79	84

Compiled from official records of the Bureau of Foreign and Domestic Commerce. Converted to cases of 55 pounds.
a/ Less than 500 cases.

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LIVESTOCK AND ANIMAL PRODUCTS

UNITED STATES CATTLE AND BEEF IMPORTS
INCREASE IN PROPORTION TO PRODUCTION . . .

Cattle and beef imports into the United States in the first 9 months of 1941, converted to a dressed-weight basis, represented a considerably larger percentage of federally inspected beef and veal production than a year earlier, despite an increase in production. Imports so far this year have amounted to 7.5 percent of production against 6.4 percent a year earlier. The rise in the ratio of imports to production is the result of substantially heavier imports, both of live cattle and meat in the September quarter of this year than in 1940. The relationship between imports and production in the first half of 1941 was about the same as in the corresponding period of 1940. The farm price of cattle averaged $8.66 per 100 pounds for the 9-month period this year, an increase of $1.30 per 100 pounds above 1940. On October 15, 1941, the price was $9.18 compared with $7.77 a year ago.

UNITED STATES: Imports of cattle and beef, domestic slaughter, and farm price, 1930-1940, January-September 1940 and 1941

Year	Imports a/					Federally inspected slaughter of cattle & calves dressed wt. basis c/	Percentage imports are of inspected slaughter	Average farm price per 100 pounds of beef cattle d/
		Dressed-weight basis						
	Cattle (dutiable) b/	Cattle (dutiable)	Canned beef	Other beef	Total cattle and beef			
	Number	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Percent	Dollars
1930	226,273	49,697	140,263	19,459	209,419	4,704,316	4.5	7.71
1931	85,570	17,797	48,494	3,494	70,256	4,751,470	1.5	5.53
1932	95,407	19,200	61,598	1,697	82,495	4,394,048	1.9	4.25
1933	63,329	9,829	103,360	970	114,159	5,045,914	2.3	3.75
1934	57,679	11,091	116,685	1,149	128,925	5,602,186	2.3	4.13
1935	364,623	105,009	190,658	10,248	305,915	5,167,023	5.9	6.06
1936	399,113	127,075	219,509	6,200	352,784	5,969,908	5.9	5.82
1937	494,946	153,600	200,243	6,592	380,435	5,374,285	7.1	7.01
1938	424,300	124,332	196,493	3,239	330,064	5,379,425	6.1	6.56
1939	753,470	220,818	214,657	4,617	440,092	5,362,515	8.2	7.13
1940 e/..	630,211	182,761	153,363	14,166	350,290	5,539,115	6.3	7.52
Jan.-Sept								
1940 e/	470,891	125,413	127,004	7,008	259,425	4,054,639	6.4	7.36
1941 e/	550,965	147,320	170,444	27,406	345,170	4,583,899	7.5	8.66

Compiled from official sources.
a/ Imports for consumption. b/ Includes a few dairy cattle from Canada.
c/ Averaged 68 percent of estimated total slaughter (dressed weight) in 1940.
d/ Revised. e/ Preliminary.

Exports of beef in the first 9 months of 1941, while small as compared with imports, amounted to 23 million pounds, an increase of 86 percent compared with the same period of 1940. Exports formerly have been mainly to Panama and the Philippine Islands, and at present it is believed that most of the beef continues to go to the same destinations. Official figures of destination by countries are not being released.

Live-Cattle Imports

Imports of dutiable live cattle and calves into the United States from all sources in the first 9 months of 1941 totaled 551,000 head against 471,000 in the same period a year earlier. Last year imports in the first three quarters represented 75 percent of total annual imports.

Entries from Mexico in the first 9 months of 1941 reached 384,000 against 301,000 a year earlier, the bulk falling within the weight class of 200 to 699 pounds and paying the full 1930 tariff rate of 2.5 cents per pound. The fact that prices of feeder cattle in the United States have been high in relation to slaughter cattle may tend to reduce imports of feeder cattle from Mexico in the next few months. Imports of cattle of feeder weights in the September quarter showed less increase above a year ago than in the first two quarters.

Entries of heavy cattle from Mexico have exceeded the low-duty quarterly quota of 8,280 head allotted countries other than Canada each quarter of 1941, and, of the 41,163 head received in the first three quarters, over 16,300 were required to pay the full tariff rate of 3 cents per pound. Mexico has already filled the low-duty quota of 6,212 allotted other countries for the last quarter of 1941 and will be required to pay the full duty on any entries exceeding that number.

Canadian cattle entries during the 9 months amounted to 167,000 against 170,000 a year earlier, the larger share, or 95,751 head, falling within the heavy weight class of 700 pounds and over. These entered at the reduced tariff rate of 1.5 cents per pound, as the quarterly quota of 51,720 permitted entry from that country at the reduced tariff rate has not been filled in any quarter this year. Notwithstanding expected heavy fall marketing and the fact that by November 1, Canada had more than half filled the low-duty quota for heavy cattle for the last quarter of the year, it is not believed that the annual low-duty quota of 193,950 head of heavy cattle from that country will be reached in 1941.

Imports of calves under 200 pounds from all countries in the first 9 months of 1941 totaled 94,645 and were 3 percent fewer than in the same period of 1941. Canada furnished 60 percent of the total. The annual quota of calves from all countries permitted entry at the reduced tariff rate of 1.5 cents per pound is 100,000.

UNITED STATES: Dutiable-cattle imports by weight classes, 1936-1940, January-September 1940, 1941

Country and year	700 pounds and over: Dairy	700 pounds and over: Others	700 pounds and over: Total	Under 700 pounds: Under 200 pounds a/	Under 700 pounds: 200 to 699 pounds b/	Under 700 pounds: Total	Total dutiable cattle
	Number	Number	Number	Number	Number	Number	Number
CANADA							
1936	6,676	136,533	143,219	55,695	35,149	90,844	234,063
1937	6,723	157,468	164,191	80,792	50,355	131,147	295,338
1938	7,442	75,529	82,971	45,645	9,147	54,802	137,773
1939	8,570	172,753	181,323	81,832	11,229	93,061	274,356
1940 c/	9,595	125,004	134,599	74,681	10,076	84,757	219,356
Jan.-Sept.							
1940 c/	6,919	87,716	94,635	68,960	6,730	75,690	170,325
1941 c/	8,793	95,751	104,544	56,720	5,743	62,463	167,007
MEXICO							
1936	0	22,190	22,190	1,615	140,241	141,856	164,046
1937	0	24,792	24,792	1,259	172,717	173,976	198,768
1938	0	49,740	49,740	2,062	233,752	235,814	285,554
1939	0	55,232	55,232	33,259	390,074	423,333	478,565
1940 c/	0	44,715	44,715	29,921	336,207	366,128	410,843
Jan.-Sept.							
1940 c/	0	30,839	30,839	28,382	241,333	269,715	300,554
1941 c/	0	41,163	41,163	37,925	304,851	342,776	383,939
TOTAL d/							
1936	6,689	158,873	165,562	57,314	176,237	233,551	399,113
1937	6,724	182,333	189,057	82,052	223,837	305,889	494,946
1938	7,446	125,315	132,761	47,708	243,553	291,261	424,022
1939	8,606	228,001	236,607	116,216	401,747	516,963	753,570
1940 c/	9,600	169,720	179,320	104,602	346,289	450,891	630,211
Jan.-Sept.							
1940 c/	6,924	118,556	125,480	97,342	248,069	345,411	470,891
1941 c/	8,793	136,933	145,726	94,645	310,594	405,239	550,965

Compiled from official records, Bureau of Foreign and Domestic Commerce.
a/ Under 175 pounds prior to January 1, 1939, in second agreement with Canada. b/ 175 to 699 pounds prior to January 1, 1939. c/ Preliminary.
d/ Includes a few head from countries other than Canada and Mexico.

Beef and Veal Imports

Beef and veal imports in the first 9 months of 1941, on a dressed-weight basis, totaled 198 million pounds, an increase of 48 percent above the same period of 1940. Imports were almost as large as for the entire year 1940, when they were 24 percent smaller than in 1939. Notwithstanding the increased imports in 1941, imports represented only a small proportion of domestic production, or 4 percent.

Imports of South American canned beef, dressed-weight basis totaled 170 million pounds and were 34 percent larger than a year earlier, whereas imports of other beef, chiefly from Cuba, amounted to 27 million pounds compared with only 7 million a year earlier.

CANNED BEEF: Imports into the United States, January-September 1940 and 1941
(Actual weight)

Year and month	Argentina	Uruguay	Brazil	Paraguay	Total a/
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
1940					
January	3,748	1,[illegible]4	2,787	387	8,407
February	3,412	562	2,042	425	6,445
March	3,150	638	195	773	4,757
April	1,994	721	1,483	336	4,536
May	5,334	549	2,922	274	9,080
June	2,472	378	1,699	301	4,851
July	1,804	98	1,703	465	4,070
August	1,398	486	2,246	510	4,640
September	1,049	437	2,146	384	4,016
January-September	24,361	4,333	11,129	2,497	38,075
1941					
January	3,329	418	1,258	332	5,363
February	3,367	262	2,188	298	6,242
March	3,624	270	1,283	738	5,925
April	5,390	137	696	725	6,998
May	6,781	775	1,176	592	9,343
June	2,704	306	2,042	236	5,326
July	1,554	481	1,422	603	4,066
August	3,460	3,166	1,479	813	8,936
September	8,692	2,207	3,066	2,012	15,978
January-September	38,902	8,023	14,589	6,350	68,178

Compiled from official records, Bureau of Foreign and Domestic Commerce.

In the new Argentine trade agreement, the duty on canned, pickled, and cured beef was reduced to 3 cents per pound but not less than 20 percent ad valorem, instead of the 1930 tariff rate of 6 cents per pound or not less than 20 percent ad valorem. The reduction in duty became effective November 15. The bulk of the canned-beef imports are from Argentina, Brazil, Uruguay, and Paraguay, all of which will benefit from the reduction in the tariff rate in accordance with the most-favored-nation tariff policy of the United States, which extends concessions granted to one country to all except Germany (at the present time). In the first 9 months of 1941, total canned-beef imports, actual weight, amounted to 68 million pounds, 57 percent of which was from Argentina, 21 percent from Brazil, 12 percent from Uruguay, and 9 percent from Paraguay.

Argentina and Uruguay naturally prefer to market surplus beef in a chilled or frozen state, prices of which are materially higher than those for canned beef. In 1941-42 (October-September) most of the beef surplus is under contract for delivery to the United Kingdom.

It is reported that cattle slaughter in Uruguay, for the purpose of filling British orders, has been so heavy that at present there is a scarcity of cattle of suitable slaughter weights. Under the new United States-Argentine Trade Agreement, imports of canned beef from the South American countries may increase somewhat in the coming year, especially imports from Brazil and Paruguay which, unlike Argentina and Uruguay, have not developed an important market in the United Kingdom.

In the case of imports of chilled beef and veal from Cuba, which is entitled to a rate 20 percent below the regular tariff rate of 6 cents per pound, the quantity imported will depend on prices in the United States, Cuba's potentialities as a surplus cattle-producing country, and such restrictions as may be placed on exports by the local authorities to protect the domestic consumer in that country. Notwithstanding the increase in imports of Cuban beef this year, the total amounted to only 7 percent of cattle and beef imports in the first 9 months of 1941. Cuba is a small country, and, while beef exports to the United States may increase, indications are that they will represent a small proportion of our cattle and beef imports.

UNITED STATES: Imports of fresh, chilled, or frozen, and pickled beef and veal, January-September, 1940 and 1941
(Actual weight)

Country	Fresh, chilled, or frozen		Pickled		Total	
	1940	1941	1940	1941	1940	1941
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Canada	351	150	6	23	357	173
Cuba	4,800	24,131	2	8	4,802	24,139
Australia	329	138	-	-	329	138
New Zealand	424	1,715	-	-	424	1,715
Argentina	-	-	-	20	-	20
Brazil	-	-	124	21	124	21
Uruguay	-	-	947	955	947	955
Total	5,904	26,134	1,079	1,027	6,983	27,161
Others	17	0	1	32	18	32
Total all countries	5,921	26,134	1,080	1,059	7,001	27,193

Compiled from official records, Bureau of Foreign and Domestic Commerce.

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CANADA'S DAIRY PRODUCTION ABOVE
1940 OUTPUT . . . .

Canada's total production of dairy products during the first 10 months of 1941 continued above the 1940 production for the same period, but was retarded by current high feed costs and the summer drought experienced in the Provinces of Quebec and Ontario, according to latest reports received in the Office of Foreign Agricultural Relations. Although cheese production was about the same as during the first 10 months of 1940 and skim-milk powder was slightly lower, production of butter and evaporated whole milk were substantially higher (January-September figures).

Considerable difficulty has been experienced by Canada in its effort to increase cheese production to fulfill the 1941-42 cheese contract of 112 million pounds with the United Kingdom by the end of the contract year, April 1, 1942. Although cheese production in October 1941 was 5 percent below October 1940, the total production during the January-October 1941 period was less than 1 percent below the same months in 1940. Butter production, on the other hand, manifested a 10-percent increase during October 1941 as compared with October 1940, and the total production for the 10 months was 9 percent above production during the same months of 1940. Only in July was butter production lower during any of the January-October months of 1941 as compared with the corresponding months of 1940, while cheese production was lower during 7 of the 10 months. Most of the decreases were experienced during the lighter producing months, however.

CANADA: Production of butter and cheese, January-October, 1940 and 1941

Month	Butter			Cheese		
	1940	1941	Percentage of change	1940	1941	Percentage of change
	1,000 pounds	1,000 pounds	Percent	1,000 pounds	1,000 pounds	Percent
January	10,450	11,727	+12.2	1,806	1,110	-38.5
February	9,149	9,959	+8.3	1,831	959	-47.6
March	10,526	12,351	+17.3	2,793	1,408	-49.6
April	16,682	19,011	+14.0	4,937	3,869	-21.6
May	27,300	32,979	+20.8	12,595	16,551	+31.4
June	40,192	40,637	+1.1	24,050	25,762	+7.1
July	39,608	39,157	-1.1	25,135	25,221	+0.3
August	33,776	35,460	+4.7	24,387	23,725	-3.1
September	26,528	32,278	+21.7	20,882	20,101	-3.7
October a/	22,584	24,896	+10.2	15,984	15,131	-5.3
January-October	236,796	258,455	+9.1	134,400	133,836	-0.4

Monthly Dairy Review of Canada. a/ Preliminary.

The increase in total production is brought about mainly by two factors. First, although the total number of milk cows as of September 1940 and 1941 was about the same, there was an increase in the percentage of those being milked from 79.7 percent to 81.7 percent.

Second, through more efficient feeding, care, and management, the production per cow has been increased from 15 pounds per day in September 1940 to nearly 17 pounds per day in September 1941. This has taken place despite current conditions that have seen feed prices rise to a high level during the past year. These feed prices, however, have been offset by higher prices received by the producer for his dairy products.

The cheese situation should be aided somewhat by an order issued by the Dairy Products Board on November 10, 1941, controlling cheddar cheese stocks held by persons in Ontario and Quebec on December 1, 1941. The order read as follows:

"That no person shall, without authorization from the Dairy Products Board, own or hold for his own account in the Provinces of Ontario and Quebec, on the first day of December 1941, an amount of Cheddar cheese greater than thirty-five (35) per centum of the amount of such cheese held on the first day of December 1940."

Although the average holding for domestic purposes in Ontario and Quebec is considered to be less than 35 per cent at the present time, it is thought that the order will have an equalizing effect on all holdings.

The Canadian dairy industry has been further affected within the past few weeks by orders controlling the maximum selling price of cheese manufactured in the Provinces of Quebec and Ontario, and authorization given the Dairy Products Board to purchase creamery butter in order to maintain butter prices.

The need for the first order was felt because all cheddar cheese produced in the above Provinces between May 26 and October 31, 1941, had been ordered by the Dairy Products Board to be delivered for export to the United Kingdom, thus limiting the domestic supply and causing prices to rise. The Order fixes at 25 cents per pound the price at which first grade cheddar cheese manufactured in the Provinces of Ontario and Quebec after October 31, 1941, may be sold or offered for sale. The prices for second and third grade cheddar cheese are set at 24.5 cents and 24 cents, respectively.

The need for the butter-purchasing order has been brought about by limited exports (since butter exports have been largely shifted to cheese exports), increased production, and a resultant increase in butter stocks, together with a lowering of prices due to these factors.

CANADA: Exports of dairy products, January-September, 1940 and 1941

Month and year	Butter	Cheese	Condensed milk	Milk powder	Evaporated milk	Fresh milk	Cream
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Gallons	Gallons
January -							
1940	94	1,966	63	444	1,501	229	-
1941	66	867	168	221	4,487	285	-
February -							
1940	77	3,952	663	368	934	244	-
1941	74	1,107	1,423	556	4,331	173	-
March -							
1940	35	5,104	71	447	2,049	162	-
1941	94	494	643	359	3,628	144	-
April -							
1940	88	2,293	63	690	1,132	232	50
1941	61	991	330	364	2,963	2,579	95
May -							
1940	52	1,183	402	431	685	402	29
1941	157	1,354	1,209	766	3,714	465	17
June -							
1940	136	3,877	455	1,067	1,059	244	60
1941	155	5,789	1,362	442	1,849	353	58
July -							
1940	129	19,195	542	260	3,562	425	30
1941.........	162	22,362	2,287	590	5,960	442	7
August -							
1940	150	22,805	964	331	6,128	274	-
1941	143	17,773	2,244	584	2,879	310	7
September -							
1940	169	17,708	764	272	4,638	350	-
1941	152	8,352	1,869	512	2,387	210	-
January - September							
1940	930	78,083	3,987	4,310	21,688	2,562	169
1941	1,064	59,089	11,535	4,394	32,198	4,961	184

The Dairy Situation in Canada and The Dairy News Letter.

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